

WEB

Shepherds Junior ISA

Transfer Form

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

PLEASE NOTE: A CHILD TRUST FUND CANNOT BE TRANSFERRED TO A JUNIOR ISA

A Applicant/Payer Details

1 Mr/ Mrs/ Ms / Miss / Other **2** Male Female **3** Surname _____

4 Forename(s) _____

5 Address _____
_____ Postcode _____

6 Telephone No. **(Home)** _____ Telephone No. **(Business)** _____
Telephone No. **(Mobile)** _____

7 E-mail address _____

8 Date of Birth _____

B Child's Details

I apply to transfer a **Junior ISA** for:

1 Forename(s) **2** Male Female _____

3 Surname _____

5 Address _____
_____ Postcode _____

8 Date of Birth _____

9 National Insurance (NI) Number? (if your child has one)

C Investment Details

1 I apply to transfer an existing Junior ISA: A/c no.
from (old manager) To **The Shepherds Friendly Society**
address of the existing JISA provider

2 Please complete below if you wish to invest more into the Junior ISA:

Regular Monthly Premium £ (Min £10 a month) Lump-sum £ (Min £100)

Maximum total contributions must not exceed JISA limits

If you are investing by lump-sum, please forward your cheque for the stated amount together with this application form to:
The Shepherds Friendly Society, FREEPOST, Shepherds House, Stockport Road, Cheadle, Cheshire, SK8 2AA.

If you are contributing by a regular monthly premium, please fill in the Direct Debit form attached to this application form.

I declare that

- am 16 years of age or over;
- am the child/I have parental responsibility for the child;
- am the registered contact for the Junior ISA.

I authorise The Shepherds Friendly Society Limited

- to hold the child's subscriptions, Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash;

and

- to make on the child's behalf any claims to relief from tax in respect of Junior ISA investments.

I have read the Key Features document and agree that this application will form the basis of the contract with The Shepherds Friendly Society Limited. .

I declare that this application form has been completed to the best of my knowledge and belief.

The Shepherds Friendly Society Limited may use information provided in relation to this application to make electronic searches about me at Credit Reference Agencies that supply information, including information from the Electoral Roll, for the purposes of verifying my identity. I understand that these Agencies will record details of any such searches whether or not this application proceeds.

I understand that The Shepherds Friendly Society Limited reserve the right to request any such other documentary evidence it considers necessary to assist in the verification of my identity.

I understand that The Shepherds Friendly Society Limited may use information provided in relation to this application to process this application and for the ongoing management of my policy. Information may be held on computer, paper file or other appropriate medium for as long as the application is being considered, for as long as the policy remains in force and for an appropriate period thereafter.

Your information will be held by The Shepherds Friendly Limited. The information that you have supplied will be kept confidential and will not be disclosed to any other party without your consent unless it is lawful to do so.

It may be used to keep our records up to date, for business analysis and market research purposes and to advise you by post, telephone and /or electronic methods about any products and services offered by The Shepherds Friendly Society Limited and its subsidiaries that may be of interest to you. We may pass your details to other carefully selected organisations but only for the purposes mentioned above. If you would like to request a copy of the information held about you please write to The Shepherds Friendly Society Limited Data Protection co-ordinator. A fee may be charged for providing information.

If you do not want to receive such marketing information please tick the box.

Signature _____

Date _____

Full Name _____

(BLOCK CAPITALS PLEASE)

Note: Acceptance of this application is at the discretion of Shepherds Friendly.

The Shepherds Friendly Society Limited

Registered Office: Shepherds House, Stockport Road, Cheadle, Cheshire SK8 2AA **Tel:** 0161 428 1212 **Fax:** 0161 428 3666

Email: info@shepherdsfriendly.co.uk **Web:** www.shepherds.co.uk

